

## **Training Plan Process**

### **CenterPoint Local Management Entity SOC Planning – November 2006**

Training plans often include a list of formal training topics to deliver to front line employees. However, transfer of learning only occurs with a full array of learning opportunities inclusive of formal overview training, skill building training, supervisory support or coaching, quality improvement feedback, practice and review, ongoing training follow up and technical assistance. A good training plan will be the result of an array of training methods, but will also be inclusive of the system's overall vision, mission, agreements and strategic plans.

This document proposes a process for development of a comprehensive training plan. When developing a planning process for training, the following considerations should be given:

1. Assess what your training priorities and needs are
2. Recruit committee members to oversee training plan development and implementation – (leadership must understand the vision and steps to reach the vision)
3. Target outcomes/indicators and how the committee will know they have reached those outcomes
4. Make a plan for implementation of the priorities inclusive of formal training, practice development, technical assistance, and supervisory coaching
5. Specify how plan connects to quality of Care framework, agency vision, strategic plan and quality improvement processes within the system
6. Target and recruit participants for training
7. Provide training, evaluate, incorporate learning and continue implementation
8. Create a sustainability plan

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The following portion of this document defines each of the above steps to the planning process.

#### **1. Assess training priorities and needs:**

Formal assessments, surveys, telephone conversations, and data all can be used to determine priorities.

#### **2. Recruit committee members to oversee training plan development and implementation**

A Training Committee should be formed in a calculated way. Member recruitment should include a diverse group, preferably made up of people who understand training/skill needs and have delivered training. The chair of this committee needs to have an understanding of the bigger picture, including current strategic plans, Collaborative plans and access to data and quality improvement activities, in order to ensure that training activities support or are supported by the greater goals of the system.

### **3. Target outcomes/indicators and how the committee will know they have reached those outcomes**

Based on the training needs assessment and the strategic planning priorities, outcomes and training goals must be set. This should include a vision of what the outcome will be and what practice will look like when training plans have been fully implemented. This should be measurable and clear to all committee members and everyone should be able to know when you have gotten there. For example, if you implement training for Person Centered Planning, an outcome may be that all CSS providers practice consistent planning methods for the PCP process. Next, the committee must define how they will know when the practice has changed and is meeting the identified outcome. This is done in several ways: training evaluation, satisfaction surveys, data collection, and quality improvement activities. The one way to know if PCP practice has changed is to sit in a meeting and watch. So one example of an outcome measurement may be to include PCP meeting observations as a measurement of new practice outcomes.

### **4. Make a plan for implementation**

Once outcomes are targeted, determining how to train is the next critical step. Depending on the training, technical assistance and practice development needed, this part of the plan can vary tremendously. However, to ensure that new learning is transferred to practice, several levels of teaching need to be incorporated into the plan. These levels of teaching include:

- **Overviews:** These trainings provide an overview of the topic but do not provide details for skill building. Often these trainings are brief and can be provided to management groups to inform policy and procedural development.
- **Skill Building:** These training topics teach process and specific skills that can be used to implement new practice or tasks. These trainings usually provide tools and guidance for ongoing implementation of the new practice or task.
- **Practice Development:** These training sessions are designed to provide intense individual or small group practice of the new skill or task. They can be provided in formal or informal settings, but are opportunities for one to practice new skill in an artificial or staged environment where support and feedback are available to promote deeper learning.
- **Technical Assistance:** This is an optional way to provide ongoing coaching, support or assistance in implementation of new plans, practice or tasks. Individuals, either local or contracted, assist a site in the work they do locally. Technical assistance is provided on site.
- **Supervisory Coaching:** This is specific training and coaching for supervisors and is tailored to supervisors and teaching them how to continue and promote learning of new skills among their employees.

Plans with a variety of learning techniques will support the learning of new skills over time. A logical progression of training, technical assistance and support is necessary and often is only completed over several years of consistent implementation.

### **5. Connect plan to greater strategic plan and quality improvement**

Again, quality improvement activities are just as necessary for training outcomes as any other outcome in the system. Data can show if service delivery is more available, if clinical outcomes are improving or if consumers are in service for shorter lengths of stay, but quality improvement activities can support the details of practice change over time. Once a plan is developed, it should connect to these activities specifically. Keep in mind that training plan will teach new tasks and skills, so the quality improvement activities should also reflect new ways to ensure practice is changing. The training activities should not be forced into the existing quality improvement activities, but developed in a collaborative manner to reflect exactly what is needed to support reaching training outcomes.

### **6. Target and recruit participants for training**

Once a training plan is ready to deliver, careful, targeted recruitment should occur. How people are notified of training, times and locations of training delivery, expectations of attendance and how training connects to participant's work are all necessary to ensure good turn out.

### **7. Begin training, evaluate, adjust and continue implementation**

Every training should be evaluated by the participants. Collection of a training evaluation is good, but the development of a useful evaluation is better! Be sure that your evaluation forms ask questions not only about reaching objectives, rating facilitators, best and least useful portion of training, but questions that will provide feedback for that particular training and other training needs. Asking a question such as "What skill area was not covered in this training that you need help with?" can inform adjustments to or creation of new curricula. Also, the needs assessment process is ongoing and a question that asks about other needed topics for future training will inform the training committee's work. Basically, think carefully about what you need from participants, while you have them there, to continue to inform your training development work.

### **8. Create a sustainability plan**

Training plans are often expensive to implement initially and when budgets get tight, training is often the first to go. However, planning a way to sustain training early on will support the plan implementation on an ongoing basis. In order to sustain training the following questions must be asked and answered:

- What is our capacity to create a local pool of trainers? What are our current local training resources?
- How can we prepare a training pool if it does not already exist?
- What does it take to support the time commitment to develop, prepare and deliver quality training on an ongoing basis?
- What topics are critical to orientation and ongoing required training across the system that we can deliver ourselves?
- How do we fund our own ongoing training plan implementation delivery?